ACCURATE

INNOVATION | EDUCATION | TECHNOLOGY

ASSESSMENT SERVICES PROPOSAL

PREPARED FOR:

Town of Berry

Dane County, Wisconsin

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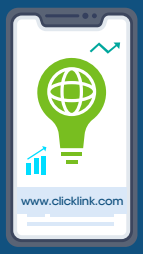
Accurate is an independent contractor pursuant to Sec. 62.09(1)(c) Wis. Stats. Accurate will never subcontract any portion of the contract with the Town of Berry to any other firms or individuals.

This proposal is built to be INTERACTIVE!

Throughout this document you will see QR codes. Use your cell phone camera app and point your camera at the QR code. A link will pop up. Click on the link to watch videos, visit websites and much more!

Open your camera app and hover your phone over the QR Code. Your camera will automatically scan the QR code.



A clickable link will appear. Select the link and enjoy the content!

Test this link to our website!

Viewing this as a digital copy? You can click the QR codes to view the content in the proposal.

INTRODUCTION

We're excited to have the opportunity to continue to work with the Town of Berry!

We've been your assessor for over a decade and we have developed a deep understanding of the Town of Berry community, its neighborhoods, its growth, and its unique character. As the town continues to evolve, we are confident that our experience and proven track record make us the most qualified to continue this important work.

Our commitment to accuracy is reflected in the consistency of our assessments over a decade. We firmly believe that every property owner deserves to be engaged in the assessment process—not just presented with the outcome. That belief drives our efforts to ensure transparency, fairness, and equity in every interaction

TRANSPARENCY

is our core principle in educating and empowering those we serve.

our employees.
municipalities.
the community.

ACCURATE

PO BOX 415 | Menasha WI 54952-0415 | info@accurateassessor.com | 920.749.8098 | accurateassessor.com

TOWN OF BERRY ASSESSMENT TEAM

Alanna Carter
Main Point of Contact

Zac Schmidt
Statutory Assessor

Terri Muskevitsch
Customer Service Manager

Colin Loughrin
Review Manager

Bill Gaber
Operations Manager

Lori Sacco
Fieldwork Manager

Our Mission:

Engaging our employees to collaborate, educate, and deliver the most reliable and transparent assessment solutions through innovation, communication and technology.

SERVICE TEAM

At Accurate we form service teams to ensure the accuracy and effectiveness of our assessiments Bill Gaber leads the Accurate team. **Alanna Carter is your main point of contact.** Alanna will take all correspondence from the Town and handle the process of assessment for the Town of Berry. Zac Schmidt will be your statutory assessor. He is a certified assessor II and will be supervising the assessment schedule, attending the Board of Review, and signing the roll.

Alanna will also be involved in the process of building an intentional community education plan with creative videos, mailings and social media content for the Interim Market Update. In addition, Zac will be involved in the fieldwork process and the building permit checking process.

"Taking the time day in and day out to make sure the clerk has a better experience has made my job a blast. Brenda has been wonderful to work with! I look forward to continuing to grow our relationship."

Alanna Carter

Main Point of Contact
Marketing and Account Development Coordinator

acarter@accurateassessor.com 920.749.8098

"I truly value the opportunity to be out in the community during the fieldwork process. It's rewarding to connect with residents, provide education, and support them in understanding and navigating the assessment process."

Zac Schmidt

Satutory Assessor

zacs@accurateassessor.com 920.749.8098

"Being able to ensure each step of the process is completed has been amazing. We've been able to take big leaps in process improvments and look forward to continuing to innovate."

Bill Gaber

Operations Manager - Assessor III

billg@accurateassessor.com 920.749.8098

mmunication Prompt

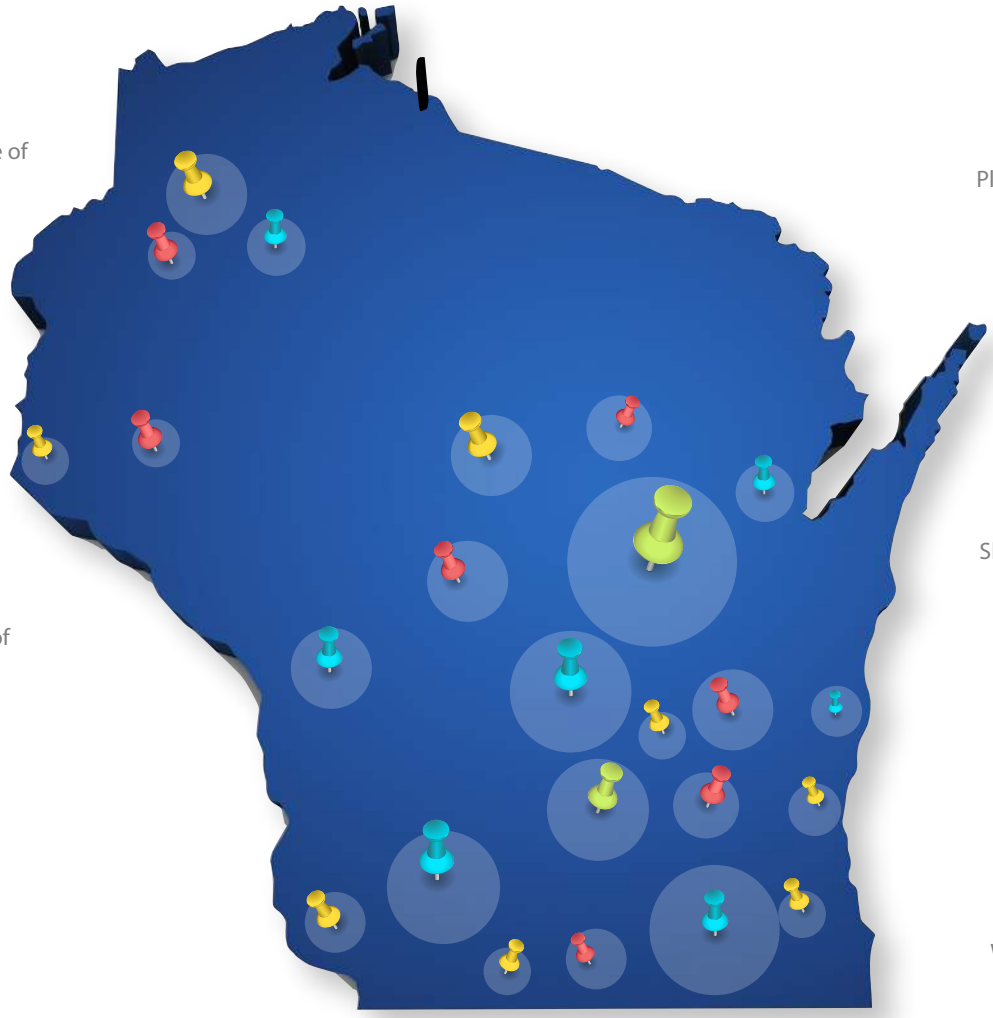
WHO WE SERVE

Accurate assesses for **over 100 municipalities across Wisconsin.** Our assessors live in the areas closest to their region which allows us to be more reactive to our customer's needs.

Albion, Town of
Altoona, City of
Baraboo, City of
Bayside, Village of
Beaver Dam, City of
Beloit, Town of
Berry, Town of
Blooming Grove, Town of
Blue Mounds, Village of
Boscobel, City of
Brillion, City of
Brooklyn, Village of
Buchanan, Town of
Burlington, City of
Caledonia, Town of
Cambria, Village of
Cambridge, Village of
Chilton, City of
Cleveland, Village of
Coloma, Village of
Combined Locks, Village of
Courtland, Town of
Cross Plains, Village of
Cudahy, City of
Dale, Town of
Darien, Town of
Dayton, Town of
De Pere, City of
Deerfield, Town of
Deerfield, Village of
Dekorra, Town of
Delavan, Town of
Edgerton, City of
Eldorado, Town of
Elkhorn, City of
Fontana, Village of
Footville, Village of
Fort Winnebago, Town of
Fox Crossing, Village of
Fox Lake, Town of
Friesland, Village of
Fulton, Town of
Geneva, Town of
Glendale, City of
Grand Chute, Town of
Green Valley, Town of
Greenville, Village of
Harrison, Village of
Hazel Green, Village of
Jamestown, Town of
Jefferson, City of
Kewaunee, City of
Lancaster, City of

New Contracts for 2025

T of Rutland
T of Belleville
C of Richland Center
V of Summit
V of Whitelaw
V of Lisbon
C of Waukesha - Commercial Only



Lyons, Town of
Marathon, Town of
McFarland, Village of
Medford, City of
Menominee, Town of
Monona, City of
Monroe, City of
Mosinee, City of
Mt Horeb, Village of
New Glarus, Village of
New Richmond, City of
Oakland, Town of
Oconomowoc, City of
Oconto Falls, City of
Onalaska, City of
Oregon, Town of
Oregon, Village of
Pacific, Town of
Pardeeville, Village of
Perry, Town of
Platteville, City of
Pleasant Springs, Town of
Portage, City of
Poynette, Village of
Prairie du Sac, Village of
Prescott, City of
Primrose, Town of
Randolph, Town of
Richmond, Town of
River Falls, City of
Rose, Town of
Rothschild, Village of
Saukville, Village of
Seymour, City of
Sheboygan Falls, Town of
Shorewood, Village of
Sparta, City of
Spring Prairie, Town of
Stoughton, City of
Sugar Creek, Town of
Sullivan, Village of
Two Rivers, City of
Union, Town of
Upham, Town of
Walworth, Town of
Walworth, Village of
Watertown, City of
Wescott, Town of
West Baraboo, Village of
Whitefish Bay, Village of
Whitewater, City of
Williams Bay, Village of
Windsor, Village of

ACCURATE

ASSESSMENT ACCURACY

Our long-standing partnership with the Town of Berry is the strongest testament to our ability to effectively serve a municipality with a population of approximately 1,181. We take great pride in being your assessor and sincerely hope to continue this trusted relationship.

To further illustrate our capabilities, we've highlighted several Dane County municipalities where we've successfully conducted Interim Market Updates. The Major Class Comparison Report below showcases our proven track record in bringing communities back into compliance through accurate and effective assessment practices.

Town of Albion (Interim Market Update 2022)

2022	Residential	236,812,000	240,900,200	77.04	98.30	YES	
	Commercial	23,925,000	24,840,100	7.94	96.32		
	Agricultural	4,578,300	4,573,500	1.46	100.10		
	Sum Of 5, 5M, 6, 7	43,761,900	41,366,200	13.23	105.79	YES	
	Personal	1,016,400	1,016,400	0.33	100.00		
	Total	310,093,600	312,696,400	100.00	99.17	YES	
2021	Residential	161,474,600	205,481,500	76.61	78.58	NO	
	Commercial	19,430,200	22,560,300	8.41	86.13		
	Agricultural	3,792,200	4,363,300	1.63	86.91		
	Sum Of 5, 5M, 6, 7	32,426,800	35,057,000	13.07	92.50	YES	
	Personal	656,200	754,200	0.28	87.01		
	Total	217,780,000	268,216,300	100.00	81.20	NO	1st Notice of Non-Compliance

Village of Blue Mounds (Interim Market Update 2024)

2024	Residential	95,348,800	97,078,400	86.86	98.22	YES	
	Commercial	15,031,700	14,400,600	12.88	104.38	YES	
	Agricultural	41,400	41,500	0.04	99.76		
	Sum Of 5, 5M, 6, 7	152,500	247,400	0.22	61.64		
	Personal	0	0	0.00	0.00		
	Total	110,574,400	111,767,900	100.00	98.93	YES	
2023	Residential	65,875,800	90,370,100	87.77	72.90	NO	
	Commercial	10,061,100	12,097,100	11.75	83.17	NO	
	Agricultural	27,300	37,400	0.04	72.99		
	Sum Of 5, 5M, 6, 7	152,500	226,800	0.22	67.24		
	Personal	164,700	225,600	0.22	73.01		
	Total	76,281,400	102,957,000	100.00	74.09	NO	

Town of Deerfield (Interim Market Update 2024)

2022	Residential	223,794,900	230,140,700	81.33	97.24	YES	
	Commercial	8,669,500	9,544,800	3.37	90.83		
	Agricultural	3,474,900	3,477,500	1.23	99.93		
	Sum Of 5, 5M, 6, 7	39,497,700	39,561,900	13.98	99.84	YES	
	Personal	239,200	239,200	0.08	100.00		
	Total	275,676,200	282,964,100	100.00	97.42	YES	
2021	Residential	163,028,300	192,745,900	80.80	84.58	NO	
	Commercial	7,599,000	8,677,100	3.64	87.58		
	Agricultural	3,202,300	3,301,100	1.38	97.01		
	Sum Of 5, 5M, 6, 7	30,387,500	33,519,800	14.05	90.66	YES	
	Personal	283,300	314,800	0.13	89.99		
	Total	204,500,400	238,558,700	100.00	85.72	NO	

The Department of Revenue's Major Class Comparison Report demonstrates our success in bringing municipalities similar in size to the Town of Berry back into compliance following an Interim Market Update.

ASSESSMENT TEAM

Your assessment team has access to over **200 YEARS** of assessing experience!

Our approach of the **Assessment Team** means each assessor coordinates their efforts from accountability officers to our field team and customer service. Throughout the entire assessment process - field work, attending open books and closing boards of review, our services are completed as a team. You will have full access to an account coordinator as your main point of contact throughout the contract.

Alanna Carter
Main Point of Contact

Zac Schmidt
Statutory Assessor

Terri Muskevitsch
Customer Service Manager

Colin Loughrin
Review Manager

Bill Gaber
Operations Manager

Lori Sacco
Fieldwork Manager

31 EMPLOYEES

26 ASSESSOR I & II

5 ASSESSOR III

ACCURATE

Bill Gaber has over 12 years of assessing experience. Bill came through the ranks as a field assessor, then account manager and is now the overall operations manager at Accurate. Bill is our most qualified assessor completing hundreds of market updates with a strong background in assessing commercial property. He mentors our assessment team, and works closely with the DOR to enhance assessment practices statewide. Bill is an assessor II and III.

Alanna Carter will be your main point of contact. You will have access to Alanna for tracking the workload, pulling reports, regular meetings and any training you may need. She will work with your statutory assessor on the timeline and sharing of information with you and your community. Alanna is an assessor II with 3 years of experience.

Jamie Busha is our Quality Manager. She reviews all changes made during the assessment process before notices are sent. She is an assessor II with 10 years of experience.

Colin Loughrin is our Review Manager. He will be in charge of all aspects of the valuing process. He is responsible for permits, review, and commercial review for the Market Updates. Colin is assessor II. and III with 7 years of experience, and has completed over a hundred market updates.

Terri Muskevitsch is our senior customer service agent. Terri works closely with commercial property owners that call or email our office. She will track correspondence to share with you. Terri is an assessor II, for over 16 years.

Lori Sacco is our Fieldwork Manager. She is the brains behind our fieldwork logistics and is able to keep all of our fieldwork on pace. She's an assessor II and III. Lori has 5 years of experience.

PROUD PARTNERS WITH:

LEAGUE OF WISCONSIN MUNICIPALITIES

WAAO
Wisconsin Association of Assessing Officers

Operations Manager

BILL GABER

Operations Manager - Assessor II & III

billg@accurateassessor.com 920.749.8098

ABOUT ME

I have a thorough background in business and finance. I also have over 12 years of experience in the assessment industry. My involvement in coaching youth sports has increased my leadership skills to develop successful teams. Watching teams grow and learn is my passion. I look forward to working with you and your community.

" I like to lead by example both at home for my son (20 years old) and for those that I work with."

EXPERIENCE

- Determine values using the three approaches Sales, Income, Cost
- Managed over 150 Market revaluations
- 100+ Open Book and Boards of Review
- 10+ years of scheduling fieldwork assignments
- Statistically analyze market trends
- Land valuation review
- Filed word duties
- Estimate valuations for TID creations
- GIS mapping
- Closing Boards of Review
- Logistics Coordinator

EDUCATION

University of Wisconsin - Oshkosh 1996
Business

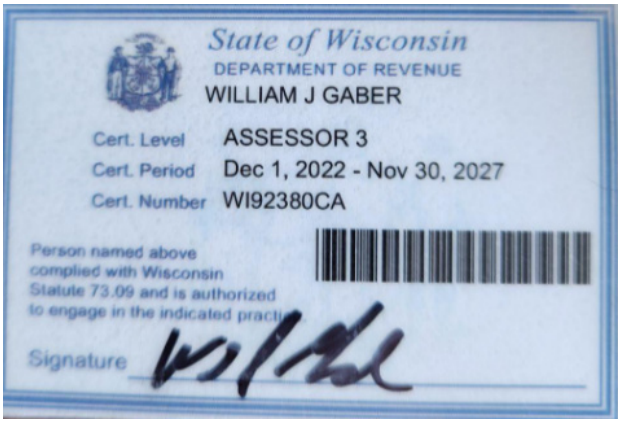
COMMUNITY INVOLVEMENT

Little League coach for 9 years
American Legion Baseball Coach for 4 years –
Won the Wisconsin AA state title in 2021
Coached youth Football for 6 years

STRENGTHS/SKILLS

Management
Organization
Team Leadership
Operations
Self-Motivation
Creativity
Communication
Development

CERTIFICATION



"There's no reason why the glass can't always be half full."

Main Point of Contact

Alanna Carter

Main Point of Contact

acarter@accurateassessor.com 920.749.8098

WHY ME?

I am an energetic self-starter with professional success in the fields of Assessing, Compliance, Finance, Sales and Education. I am an effective communicator, dedicated to achieving goals while building professional relationships. I am a quick learner committed to maintaining open communication and building the best education plan for your community.

"I've learned to be very prompt, organized, and resourceful… communication is my top priority"

EXPERIENCE

- Determine values using the three approaches: Market, Income, Cost
- Performed over 20 Market revaluations
- Statistically analyze market trends
- Closing Board of Review
- 3 years of Tax exempt property
- Estimate valuations for TID creations
- GIS mapping

STRENGTHS/SKILLS

Management
Organization
Team Leadership
Quality
Self-Motivation
Creativity
Communication
Response Time

EDUCATION

University of Wisconsin - Oshkosh
Bachlor of Science - Criminal Justice

COMMUNITY INVOLVEMENT

As a police office i received the Life Saving Award

"Being part of the entire assessing process creates ownership and a deep understanding of the community."

ACCURATE

STATUTORY ASSESSOR

ZAC SCHMIDT

Assessor Support Specialist - Assessor II

zacs@accurateassessor.com 920.749.8098

WHY ME?

Although new to the field, I've hit the ground running and have been eager to learn as much about assessing as possible. Being an assessor it's always exciting to meet new people, hear about their home, and of course, give a fair assessment. Whenever talking with a homeowner or a business owner, I feel it's important to educate them about what we're doing and why we're doing it. This way we help to build an understanding through good communication and education. In my spare time I spend time with my wife, extended family, do yard work bettering our home, hike, journaling, making people laugh, dabbling with photoshop on occasion, and writing novels.

"I love helping people and assessing helps out local communities by giving a fair assessment."

EXPERIENCE

- Participate in Open Book Sessions
- Represent Company at Boards of Review
- Help Customer Service with parcel specific questions
- Communicating with Property Owners
- Validating Property Sales
- Entering and Reviewing Building Permits
- Reviewing New Construction in the Field
- Preparing Assessor Forms for Board of Review
- Determine values using the three approaches: Market, Income, Cost

STRENGTHS/SKILLS

Energetic
Work Ethic
Creative
Dedicated
Positive
Relatable

CERTIFICATION

State of Wisconsin
DEPARTMENT OF REVENUE
PO BOX 8971; MADISON WI 53708-8971

Assessor Certification Program

Certification Level ASSESSOR 2
Certification Period Nov 1, 2021 - Oct 31, 2026
Certification Number WI82835CA

ZACHARY L SCHMIDT
PO BOX 415
MENASHA WI 54952

The person named above complied with Wisconsin Statute 73.09 and is authorized to engage in the indicated practice.

WORK HISTORY

Vocational Coach
Sales
Educator
Construction
Manufactoring
Volunteer Radio DJ

"Every property has a story and I can't wait to hear it."

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CUSTOMER SERVICE

When property owners call us they get a live person. Our agents are trained assessors that answer questions quickly and educate property owners on the assessment process. Our **online appointment scheduling tool** is available 24/7.

Property owners have full access to us on our main line, email address, and over the phone appointments. We utilize a visual voicemail service which speeds up our response time. Voicemails are monitored daily to we make sure respond within 24 to 48 hours. All of these services are included at no additional cost to you.

MEET OUR CUSTOMER SERVICE TEAM MEMBERS:

"Being the first connection with property owners, my goal is to be able to help them understand the process of assessing and how it affects them. Being a property owner, I understand how confusing and daunting the process can seem. It is extremely rewarding when I answer their questions, help them understand the process, and make someone's day a little better."

TERRI MUSKEVITSCH since 2007

Customer Service Manager - Assessor II

terrim@accurateassessor.com 920.749.8098

"Talking with property owners on a daily basis gives me the opportunity to educate them on the assessment process. I take it as a challenge to convey positivity when not all of my interactions start out that way. Fairness and equity is paramount in my job and I take it very seriously."

AMY BAJI since 2011

Personal Property Coordinator- Assessor II

amyb@accurateassessor.com 920.749.8098

"The best feeling in the world is hanging up a phone and knowing I was able to help property owners understand their assessment. My background in hospitality gives me the tools I need to be empathetic to their needs. I have been known to make people laugh - because my laughter is infectious."

PATTI PETERS since 2010

Customer Service - Assessor I

pattip@accurateassessor.com 920.749-8098

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EXAMPLES OF WORK

We have experience working on special projects with multiple municipalities throughout the state. Below are a few examples our ability to adapt our services and work with municipalities we that are not currently contracted with. We are committed to helping move the assessment experience forward through education, building partnerships, and supporting those in need.

1. SUMMIT

Background:
The Village of Summit was in need of measurements for exempt properties to determine the sq ft of the buildings as they had no data on file. Their assessor could not complete the work in their timeframe so their clerk reached out other assessors in the state and we were the only one to respond to their request.

Accurate's Solution:
We developed a plan to review the properties from any practicable data we could find assisted by aerial GIS to measure the sq ft of each property and store the data in a spreadsheet. We supplied them with images of the measurements along with a letter format to send to each owner for verification. We were happy to help out a municipality in need.

2. GREENVILLE

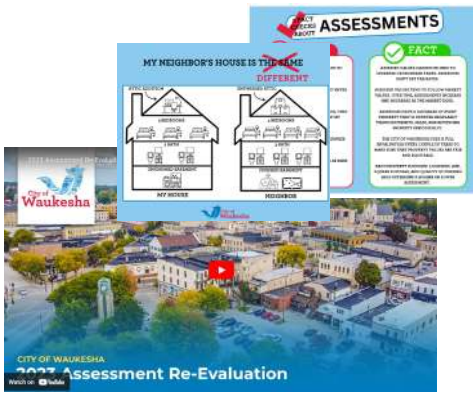
Background:
We have been the assessors for Greenville well over 10 years now. The town was incorporating to be a village in 2021. During this transition they didn't have much time to plan or execute a message to the community.

Accurate's Solution:
We reached out to Wendy at Greenville about what their plan was to educate property owners on the transition. Based on our initial meeting we offered to help them with social media posts, inserts, and explanations for what happens during an incorporation and the dates surrounding their meetings. We have also helped them update their social media with assessment education and have recently been working with them to incorporate their building permit process into our new Online Permit Portal.

3. WAUKESHA

Background:
Sam Walker, the City of Waukesha's assessor reached out to us for help with assessment education content. The City was performing a market update and had been following our linked in posts. They liked what we were sharing and wanted to use some it for their website and social media.

Accurate's Solution:
Without hesitation we connected with Sam and shared our entire library of newsletter content, post card mailings, videos, and social media content. We worked together on a few verbiage changes and stayed in touch throughout the market update process to make sure they had what they needed. They even updated some of the pieces that we now use so it was mutually beneficial. Sam still stays in touch and we are working on other projects with him.



We have many more projects we would like to share with you during the interview process, such as our recent inspections and social media education.

SCOPE OF WORK

Specific Services Required

1. The Town of Berry is seeking professional services that focus on transparency, solution-based resolution, excellent communication and responsiveness to our resident's inquiries.

2. The assessor shall be responsible for all of the work performed to properly and professionally assess and defend values for the property of the Town in accordance with applicable Wisconsin State Statutes and in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue. The individual shall be a certified Assessor. The individual designated as such shall be available to the Town for the entire contract. Should the project supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the Town.

3. The assessor shall be accountable and report to the Town Chair and Clerk/Treasurer. The assessor shall meet with the Clerk/Treasurer on a regularly scheduled basis to discuss the progress of the work and to review the data and the reports completed. The Town reserves the right to inspect the data and the progress of the work performed at any time without limitation.

4. The assessor and the Town Clerk/Treasurer shall be available to address assessment related questions during the Town hours of business. The assessor is expected to respond to assessment issues within twenty-four hours. The assessor will be required to schedule and work with the Town Clerk/Treasurer to post Open Book and Board of Review meetings. The assessor will be required to attend the Open Book and Board of Review meeting. In addition, the assessor may be required to attend a Town Board meeting if requested by the Town Chair.

5. The assessor shall oversee and assist in all assessment related clerical duties and customer service, as needed.

6. The assessor will provide a phone number and email address for the Town officials to contact the assessor during regular business hours, Monday – Friday, and shall return calls and emails within twenty-four hours.

7. The assessor will conduct in the field review and assessment of all properties that were under partial construction as of January 1st of the previous year.

8. The assessor will conduct in the field review and assessment of new construction as of January 1st of the current year.

9. The assessor will conduct in the field visit and measurement of all properties with building permits for exterior remodeling and for detached buildings and decks and other miscellaneous permits.

10. The assessor will be responsible for the accounting of all buildings destroyed or demolished.

11. The assessor will be responsible for implementing the of use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.

12. The assessor will be responsible for determining whether an organization or individual meets the requirements for exemption from property tax, and will mail written determinations to owners when requests are received.

13. The assessor will take digital photographs of new construction on or about January 1st annually, and also during the review process if needed.

14. The assessor will maintain and annually update property owner lists, with current name and address changes.

15. The assessor will validate sales and provide assessment data through the Department of Revenue PAD System, and recording of sales information to property record cards electronically.

16. The assessor will annually update all property owner information with new legal descriptions electronically.

17. The assessor will be responsible to mail Notice of Assessment to property owners and others as required by Wisconsin Statute.

18. The assessor shall notify the Town Clerk/Treasurer for the publication of Open Book and Board of Review notices prior to Open Book – at least 60 days prior to a revaluation year, or 30 days in a maintenance year.

19. The assessor will work with the Town Clerk/Treasurer who is statutorily responsible for scheduling and coordinating the annual Board of Review proceedings. The assessor will conduct Open Book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare written hearings, incorporating record of Open Book contacts to file with the State required AAR (Annual Assessor's Report).

20. The assessor will prepare an annual report of assessment roll changes for the Board of Review. The assessor shall update the Town computer records within fourteen days of the final adjournment of the Board of Review. The assessor shall oversee updating the Town assessment computer data. Assessment roll summaries and totals shall be forwarded to the Town Clerk/Treasurer, and necessary County and State representatives.

21. The assessor will attend the Board of Review hearings, serve as Town staff at the hearings and defend the assessor's valuations and work products. The assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review.

22. The assessor will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.

SCOPE OF WORK

Specific Services Required - Continued

23. The assessor will complete the coordination with the Register of Deeds/Real Property Listing office of Dane County to facilitate the digital and manual transfer of data and values.

24. The assessor shall also perform all other duties incidental to the normal duties of the assessor, including but not limited to, tracking omitted property values for future rolls, work associated with ag use conversion notices, and municipal boundary agreements.

25. All assessment files and records created data collected by the assessor shall remain the property of the Town. Records removed for work in progress shall be returned to the Town office.

26. The assessor shall communicate openly and in a timely manner with the proper Town personnel and the public regarding assessment matters. The assessor shall provide to the Town a month-in-review report communicating opportunities, issues and resolution and action taken. The assessor shall provide educational material to businesses and residents on an annual basis in order to provide greater clarity of the assessor's role in the property taxation and valuation process.

27. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with Town staff and the public.

28. All assessment personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.

29. The assessor is not permitted to assign, subcontract, or transfer the work without the written permission of the Town.

30. All personnel providing services requiring Wisconsin Department of Revenue Certifications shall be actively certified and in compliance with Wisconsin Statute Chapter 73.09 as prescribed in the Wisconsin Property Assessment Manual.

31. The assessor shall obtain and maintain full coverage insurance, with the Town as a named insured, which insurance shall include:
a. Worker's compensation in compliance with Wisconsin State laws
b. Comprehensive general and public liability coverage, and
c. Comprehensive automobile liability and property damage with coverage to include owned, hired, and non-hired motor vehicles used by Assessor with the following minimum limits: Bodily injury $500,000/person, $1,000,000/ occurrence, and Property damage $250,000/occurrence.
Prior to commencing services, Assessor shall provide the Town with certificates for all required insurance. All insurance coverage shall contain a 10-day advance notice of cancellation to the Town. Assessor shall timely pay all insurance premiums.

32. The assessor agrees to carry proper and sufficient insurance to cover loss of the Town's records, as well as assessor's records in process under this agreement, which are in possession of the assessor. The assessor shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the Town.

33. The assessor shall be responsible for the proper completion of the assessment roll in accordance with State Law. Final assessment figures for each property shall be provided by the assessor to the County. All necessary measures and cooperation shall be exercised to balance said roll between the county and assessor. The assessor shall prepare and submit the Municipal Assessment Report (MAR) to the Department of Revenue in a timely manner.

34. The assessor shall insure that employees maintain strict confidence regarding all privileged information received by reason of this contract. Disclosure of this or any appraisal information to any individual, firm, or corporation other than appropriate public officials or their authorized agents is expressly prohibited.

35. The assessor shall be required to execute a contract with the Town that incorporates the information included in this RFP.

36. All work of the Assessment Service shall be accomplished in accordance with the provisions of the laws of the State Wisconsin and with all the rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue and the Town.

Accurate has reviewed, understands, and acknowledges each point in the Specific Service Required, detailed by the Town of Berry.

OUR CORE VALUES

We strive to always put others first and maintain transparency about our assessment process. The values we believe in are not just empty statements. The words were carefully selected, not by the owners but by the employees of Accurate. Our core values express who we are as a company, as your assessors, and how we treat each other.

WE ARE FAMILY

We have an unwavering loyalty to each other and our customers. We Respect & Encourage each other and appreciate uniqueness. We value and support each other's health, safety and work/life balance.

ALWAYS TRANSPARENT

We are Open & Honest in ALL interactions, sharing our data, processes, information, mistakes, and victories. We hold each other accountable. Our availability to our customers and family members is abundant.

EMBRACE GROWTH & INNOVATION

We are comfortable being uncomfortable while striving to get better every day. We foster and enhance customer relationships while seeking to learn and develop. We offer to teach and mentor customers and family members.

BE ADMIRABLE

We guard our integrity by doing the right thing-ALWAYS. We strive for quality and precision in our work, our products, and our services. We act like owners and honor our word and commitments. We choose candor, respect, and kindness.

WE ARE A BOATLOAD OF FUN!

Positivity is our attitude of choice. We have infectious spirits bringing enthusiasm and excitement to all we do. We are passionate and value diversity and inclusion. There's no reason too small to celebrate.

ACCURATE

OUR HISTORY

Accurate was founded 25 years ago on the idea of complete transparency and communication. For many years it was common practice for assessors to suppress information from the public. This resulted in a lack of understanding and mistrust within the community. The founders of Accurate recognized these short comings and began pioneering new innovative assessment standards. Over the last 25 years we have developed web-based digital property record cards, created online scheduling options, and built our own CAMA to update data digitally in the field. With a
combined experience of over 180 years Accurate has continuously improved the assessment experience through innovation, education, and technology.

2000 - 2005

20 municipalities
Building digital data online
New Website
Full Value Service Options
Blend Options - more affordable and budget friendly

2005 - 2010

75 municipalities
Built online scheduling
Moved to new location on Midway Rd.
Growing - added new employees

2010 - 2015

90 Municipalities
Started building proprietary CAMA
Still growing - added more employees

2015 - 2025

100+ municipalities
Digital in the field
CAMA software Prolorem launches
Live assessor certified customer service
Intentional community education plan

At Accurate we make a concerted effort to connect and learn the nuances of each community. There is no "cookie-cutter" way to assess unique communities. We tailor our services to fit the needs of everyone we serve. Here is a small sample:

UNIQUE ASSESSMENTS

Views of the Capital Building - Dane County
Views of the lake - Lake Geneva & Fontana
Bayshore Mall - Glendale
Access to the Chain of Lakes - Dayton
All of Menominee County
Dock-O-Miniums - Fontana

CORPORATE BUSINESS

Secura - Fox Crossing
Johnson Controls - Glendale
Foth - De Pere
Miron - Fox Crossing
Cleary Building - Greenville
Humana Insurance - De Pere

TAX EXEMPT EXPERIENCE

St. Norbert College - De Pere
Divine Savior Hospital - Portage
Skaalen Retirement Services - Stoughton

DISTRIBUTION/WAREHOUSING

WALMART Distribution center - Beaver Dam
Amazon - Greenville
TARGET - Oconomowoc

OUR ALL INCLUSIVE SERVICES

- Online roll books
- Digital property record cards, with photos online
- Assessment data integrated into your website
- Live, assessor operated, telephone-based open books
- Cloud based CAMA system with dedicated support
- Assessor certified customer service
- Assessors available to answer questions daily over the phone or via video chat
- Multiple assessors at open book to keep waiting to a minimum
- Interactive videos and educational materials at open book
- Active live chat function available on our website
- Community education planning with dedicated marketing person
- Virtual walk-through options
- Access to your own dedicated assessor
- Maintenance inspections included

ACCURATE

OUR COMMITMENT

Accurate has been at the forefront of moving the assessment experience forward. To accomplish this, we are fully **committed to building a culture of assessment knowledge.** Every assessor that works for accurate is required to attend knowledge sessions on each assessment process. Knowledge sessions are established by our senior assessors and encompass each aspect of assessing such as: Ag land calculations, vacant land valuation, roll books, exemptions, board of review and open book, statistics, commercial valuation, and many more.

Additionally, our assessors have book club meetings regularly to read, review, and interpret the WPAM which is our guideline for assessment practices. Spring of 2023, our assessors joined in on the first ever **listening sessions with the DOR to update and bring the WPAM guidelines and statutes into the 21st century. 14 of our assessors attended and led 6 of the round-table discussions** on assessment practices. We shared the experience with our entire team at our weekly Monday Morning Meeting.

Technology allows assessors to be more accurate in our assessments. We have been **working on a project with the WI Department of Revenue (DOR) to standardize the import and export of assessment data files.** Our IT team will continue to work with the DOR on this project to make it easier on municipalities and assessors when collecting and sharing data.

Finally, **we attend conferences annually to connect with clerks, administrators, mayors, etc.** to share ideas and build relationships with those we serve. It's our way to educate municipal officials on the assessment process. **We also enjoy having fun with the municipal officials who do so much for their communities!**

MTA WISCONSIN

LEAGUE OF WISCONSIN MUNICIPALITIES

WAAO
Wisconsin Association of Assessing Officers

WMCA
Wisconsin Municipal Clerks Association

SOFTWARE

Our proprietary CAMA system is completely **CLOUD BASED.**

With Prolorem, all property record cards are digital. They are available on our website FREE to you and your community 24/7. There are no costs to use our software and convert your Market Drive data. Prolorem converts data from all software to easily and quickly update permits. All property record cards have images and detailed information about each parcel. We believe in 100% transparency therefore all data and programs gathered are the property of the City of De Pere should you ever change assessors.

Our assessors utilize computer tablets to assess properties in the field. With Prolorem there is no need to take hand written notes back to the office to update the value on a property. Our assessors are trained to complete assessments on premise, eliminating errors from re-entering data. All property record cards are updated in real time and saved to the cloud instantly. Our CAMA is the only software that updates property record cards in real time.

Accurate has converted data into Prolorem from multiple forms of CAMA systems including Market Drive, Tyler Technologies, GVS, TC Win, and many more. Our on staff IT integrates multiple platforms like GIS, Apex Sketching Tool, iWorQ, etc to streamline our process. Because our software is proprietary we have the ability to add or remove features the City of De Pere requests at no additional cost.

PROLOREM

A REVOLUTION IN ASSESSING SOFTWARE

SOFTWARE COST: $0.00
LICENSING/MAINTENANCE: $0.00
SOFTWARE:
INTEGRATION ABILITY: YES, $0.00
CONVERSION ABILITY: YES, $0.00

There are never additional costs for conversions, updates, licensing, integrations, additions, etc.

EDUCATION PLAN

On average, most property owners have about 40 days from the time they first learn about the Market Update to when their new value is finalized.

It is standard practice for an assessor to send notices and wait for the community to reach out with questions or concerns. However, this one-way communication is not transparent and often leaves property owners scrambling to understand what's happening. Frequently, this leads to a disconnect between property owners, the municipality, and the assessor.

Our education plan puts your community first. We leverage your existing communication channels to start the conversation early. With our approach, your community will be informed about potential value changes 80 to 190 days before notices are sent out. Together, we'll establish a **two-way communication** channel through social media, council meetings, newsletters, postcard mailings, custom videos, and much more.

EXPERIENCE OUR EDUCATION PLAN:

1. SOCIAL MEDIA

Utilize your channels of social media preparing to share the process of Full Value Assessments. We mix this with a schedule of postings over the coming year to educate property owners on what to expect and the status of the current market. Involving the community ensures we have a two-way communication through the process.

2. COUNCIL MEETINGS

Your community will inevitibly have questions about the how Full Value works. We will attend council meetings to educate your council members arming them with the knowledge they need to explain the revluation assessment process with property owners.

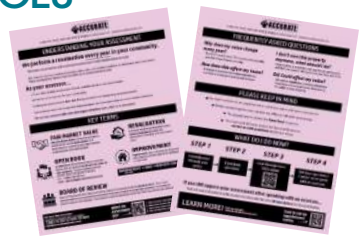
3. NEWSLETTER

Writing articles that address the assessments, what to expect, and the schedule of social media postings keep your community engaged. We can invite readers to sign up for text alerts or email updates throughout the year.

4. WEBSITE

Updating the City website with a custom video helps explain what a revaluation is and what to expect. We can build links to property record cards and show a timeline for the revaluation. The community utilizes your website as a resource, we serve them best by keeping them up to date.

5. NOTICES



A notice of new value will be mailed to every property owner. Inserted with the notice will be an Understanding Your Assessment information sheet explaining the assessment process with QR codes, links to videos, an online appointment scheduler, and access to our customer service team.

6. OPEN BOOK & BOR

We will offer over the phone Open Book appointments as well as in person options. For in person Open Book property owners will be greeted with a TV slideshow with assessment videos playing. We provide computers for property owners to search for their record cards.

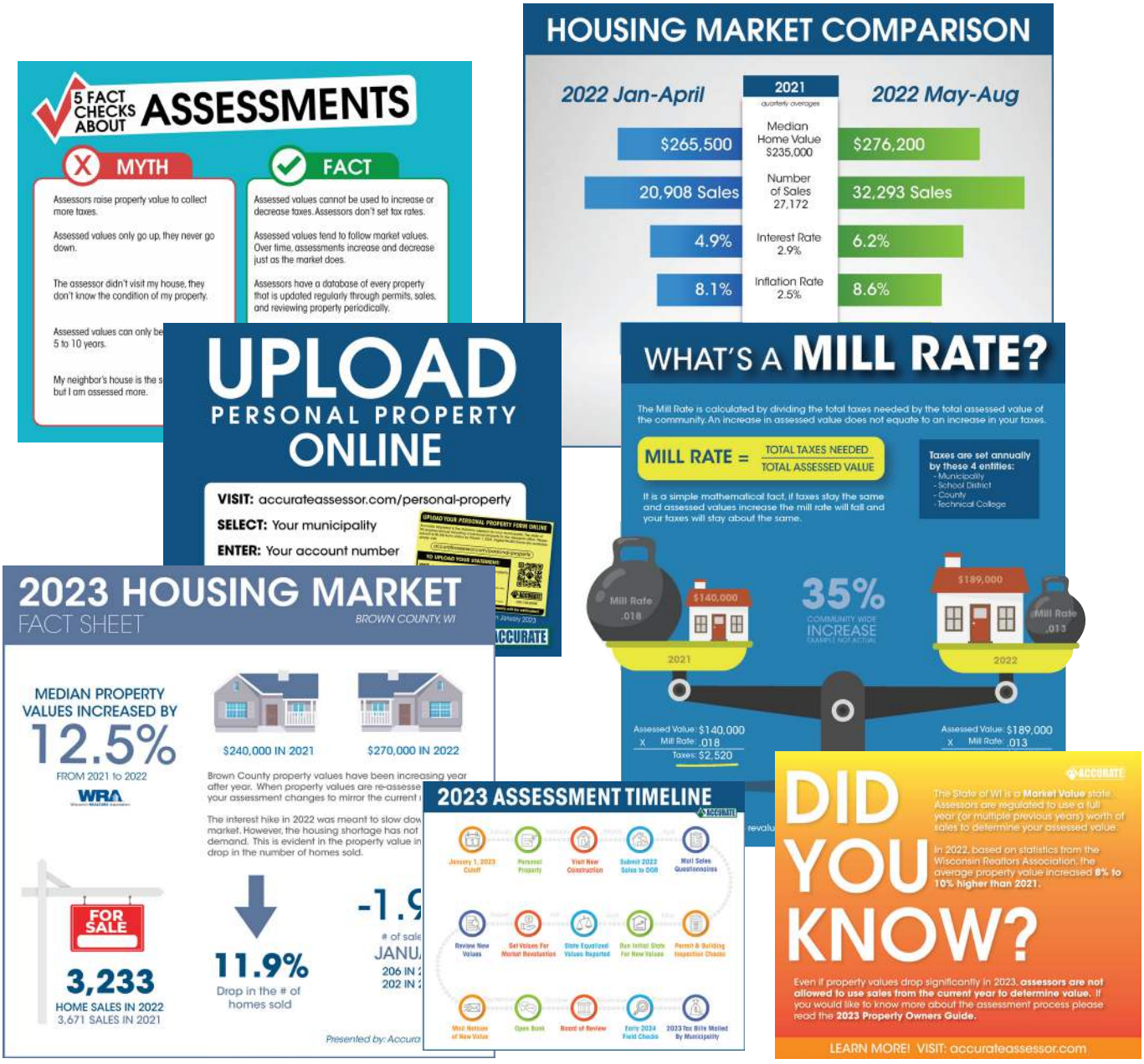
ACCURATE

SOCIAL MEDIA

We post content 4 times a week! If you haven't been using our educational content, we highly recommend meeting with our social media team to work on a regular schedule.

Through **Social Media** we build a positive and informative **two-way communication** with your community. Over 85% of 25-45 year olds use social media, and over 70% over the age of 50 use it daily.

With a simple share you can instantly connect with thousands of property owners to **quell the stigma of taxes and assessed values.** By not involving your community they may feel left out and discouraged about the assessment process. Let us help you with continual education on social media.



CHECK US OUT ONLINE!

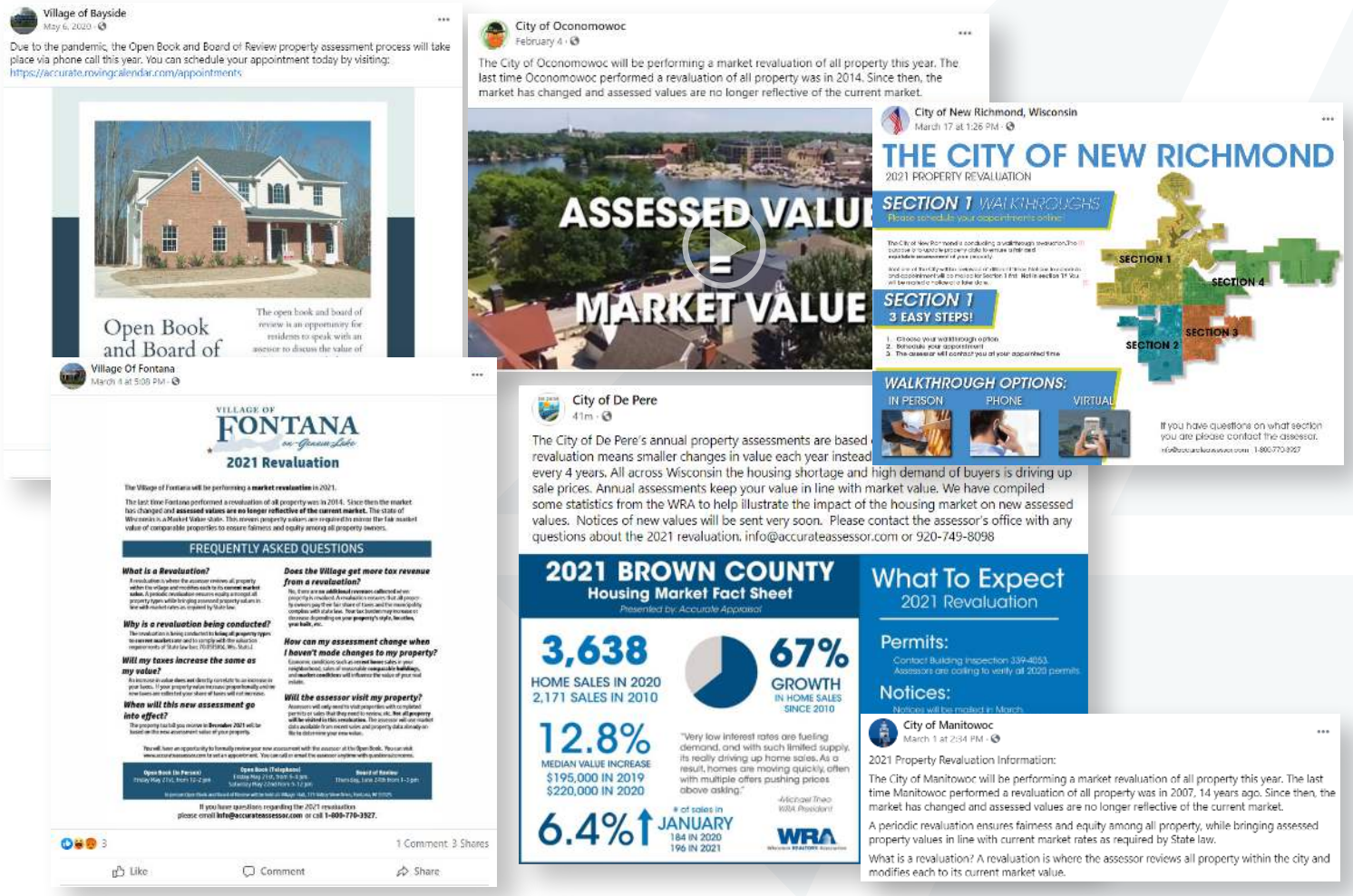
ACCURATE

www.facebook.com/accurateappraisalllc

www.linkedin.com/company/accurate-appraisal-llc

POSITIVE INTERACTION

Through social media we establish an important **two-way communication** with the people in your community. Social media helps us instantly connect with thousands of property owners. We are all aware of the stigma of taxes and assessed values. By not involving your community they feel left out and discouraged about the assessment process. Our transparency ensures they feel like they're infromed about any value changes. Engaging with your community through social media allows us to **inform, educate, and empower** them. Here are just a few examples of how we engage with our current municipalities:



Accurate builds relationships with the community. For example our Personal Property department created an instructional video on our website walking through how to fill out PP statements.

"Just wanted to let you know, I was not looking forward to filling out the form. But the instructional video and the information on your website made the process a lot easier than I thought it would be. Thank you!"

Barr Resort - Kika Barr

Our assessors go above and beyond just valuing property. The classification of land changed for this property owner. We helped him by working with the DOR on properly classifying his land.

"Paul at Accurate was very helpful with my land classification and working with the DOR. He was very gracious and professional through the journey."

Resident - Duane Wagner

ACCURATE

ASSESSMENT TIMELINE

Before January of each year we will sit with you and **discuss the options for open book and board of review dates.** We will work with you to schedule new construction checks, field work, data entry, and the date notices are mailed. Below is a suggested timeline of what happens throughout the assessment process. These dates are for example only.

JANUARY

We start every year by visiting new construction to verify the % completion of new property. Trespass notices are mailed to property owners so they know we will be in the area.

If the property is not complete as of January 1st (each year) we update our records accordingly and flag the parcel/s for a final visit to measure and list the property as complete.

This timeline may change depending on the agreed upon dates for Open Book and Board of Review. In a market update year board will be in August or September.

February

New construction field checks are reviewed and verified by our office. Sales, permits, exemptions and any other assessment related data is updated in our records.

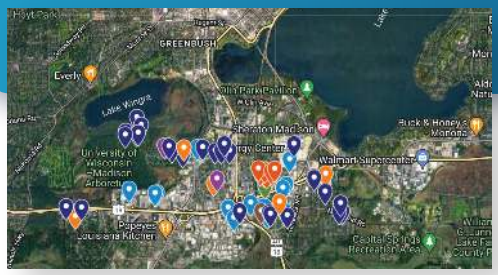
Initial DOR equalized values are reviewed.

During the market update - education is implemented through social media, newsletters, and custom content.

March

Properties are sorted and mapped for field inspections based on permits, sales, inspection requests, etc. Assessors update data on premise with their laptops.

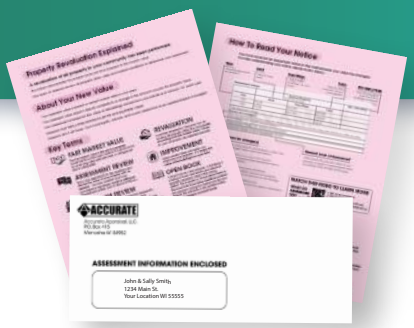
Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



March

Initial values are forecasted. Value checks are performed and revisions are made. Our import/export team works with the county to verify assessment and mailing data. Initial statutory board meeting must be held if needed.

Notices are printed and mailed. Every notice includes an educational insert with links to videos and FAQ's. Rolls are posted online.



April

The assessment review period starts. Property owners can contact Accurate by phone, email, or online appointment. The open book period begins the day they receive their notice up to 7 days before board of review begins.

Final rolls are verified with the county and prepared for Board of Review. The assessor signs the final roll.

ACCURATE

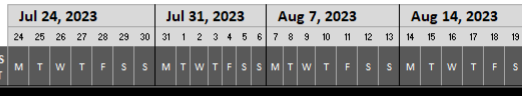
WORKLOAD

On a regular basis Alanna will meet with your team to go over accountability for our assessment team. **There will be a standard agenda to ensure open communication and that all metrics are being followed.** Below is an example of a progress report that will be created to ensure you know the progress of current processes.

City of Kenosha Interim Market Update (2024)

Project Start: Mon, 7/24/2023
Display Week: 1

TASK	ASSIGNED TO	PROGRESS	START	END	TOTAL DAYS	DAYS LEFT
Education / Publication						
Prep and share Education Plan	Chris	100%	8/1/23	8/30/23	30	-19
Update website - Add video	Chris	1%	8/1/23	4/1/24	245	196
Create content on current Res Market	Chris	1%	8/1/23	4/1/24	245	196
Initiate education through all forms of communication	Chris	1%	9/1/23	9/30/23	30	12
Mill Rate Education with Tax Bill (if allowed)		100%	11/1/23	12/31/23	61	61
Prepare notice letter and insert for 2024 market update (if allowed)		1%	11/1/23	4/1/24	153	153
Connect Accurate's Facebook to Kenosha website		1%	1/1/24	1/15/24	15	15
Send Mailer		1%	1/15/24	4/1/24	78	78
Use all avenues of Education		1%	2/1/24	4/1/24	61	61
Additional education on the BOA and BOR		1%	5/1/24	5/31/24	31	31
Data Transfer & Analysis						
Data Transfer		1%	1/1/24	1/15/24	15	15
Code Table Data Reviews & Return		1%	1/1/24	3/10/24	70	70
Fieldwork (Permits & New Construction)						
Permit Reviews (Verify permits (occ) and what our next step is, actionable or non-actionable)(Value partial Construction)		5%	8/14/23	12/31/23	140	104
Commercial Permit Value (Permits completed after 1/1/23 (value them))		5%	8/14/23	12/31/23	140	104
New Construction Checks		1%	8/14/23	12/31/23	140	104
New Construction Alterations/Progress		1%	8/14/23	12/31/23	140	104
Ag Checks (Kenosha mails letter, Lori onsite visit)		10%	9/8/23	9/29/23	22	11
Ag Checks (Kenosha 2nd letter, data update)		10%	10/1/23	11/15/23	46	46



Additional meetings will be held throughout the year. Four main annual meetings will cover:

Kick-Off Meeting:

Setting the Open Book and Board dates, education plan with reminders, reviewing the notice letter, preparing the timeline for assessments, compare permits to make sure we have all of them.

Pre Open Book Meeting:

Preparing your board with educational materials they need, reviewing the assessment rolls with the clerk, reminders about when to send out education.

Pre Board of Review Meeting:

Cover the expectations at the BOR, go over all objections to ensure we have all of them, reminder to set meeting after board ensuring the manufacturing values are in the roll for export to LaCrosse county.

End of the Year Wrap Up:

What went well, what needs to be addressed, prep for late fall field work, prepare for the next assessment year.

SERVICE OPTIONS

The service options below are reflective of our all-inclusive services. **There will never be an additional invoice for any reason.** You may retain 10% of the total fee subject to delivery of certified tax roll.

3 YEAR BLEND 2026 Market Update

	2026	2027	2028	Total
Assessor Services	Market Update	Maintenance	Maintenance	Total
Service Cost	$24,000	$12,000	$12,000	$48,000
Annual Amortized Price	**$16,000**	**$16,000**	**$16,000**	**$48,000**

5 YEAR BLEND 2026 Market Update

	2026	2027	2028	2029	2030	Total
Assessor Services	Market Update	Maintenance	Maintenance	Maintenance	Maintenance	Total
Service Cost	$24,000	$12,000	$12,000	$12,000	$12,000	$72,000
Annual Amortized Price	**$14,400**	**$14,400**	**$14,400**	**$14,400**	**$14,400**	**$72,000**

Maintenance:
We will inspect all permits, new construction and any demolitions. Every sale will be entered and reviewed. If there are changes to condition or missing information we will update the data to reflect. Any request for inspection from your community will also be visited during a maintenance year.

Market Update:
We will conduct the same services as in a maintenance year. On top of our maintenance services every year we will break down each property by neighborhood, style, age, location etc. Each will be evaluated and re-assessed to its new fair market value. A notice of new value will be mailed to the property owner. It is important to maintain a schedule of social media education to ensure your community understands how the assessment process works.

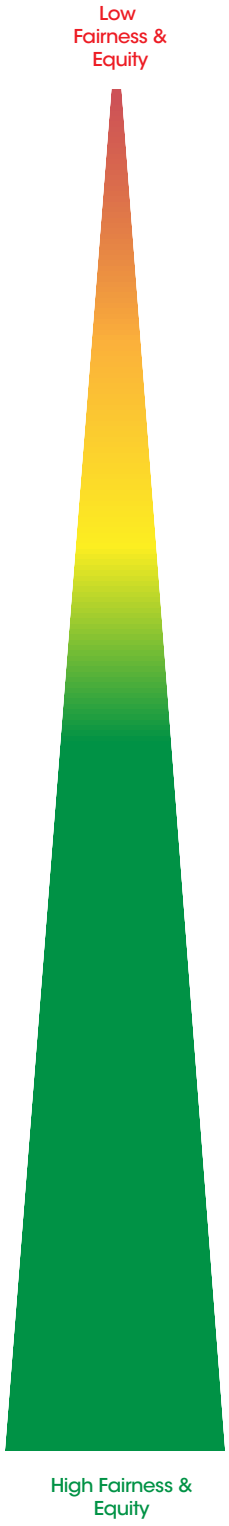
ALL INCLUSIVE SERVICES

- **FREE** Web Data Access
- **CUSTOM** Community Education
- **LIVE** Customer Service
- **ZERO** Cost to Convert Assessment Data

Would you like to see additional options?
We will work with you to customize any assessment plan to fit your community's needs.

ACCURATE

SERVICE DEFINITIONS



MAINTENANCE

We physically view any property that has changed from the previous year. This includes all new construction, property splits, and properties that have been issued a building permit, etc. Maintenance keeps property values stagant and creates inequities each year you remain in a maintenance cycle

BLEND

Blending years of maintenance with a market update creates a budget friendly option to spread the cost of a market update over the life of the contract. Using this process you could potentially bounce in and out of compliance.

REVALUATION

The purpose of a 1 year city-wide revaluation is to bring all real estate values to 100% market value. This can be done by physically inspecting all of the properties, or partial inspections over multiple years. Waiting multiple years between revaluations causes large increases or decreases in values. Fariness and equity is only high during the year the revaluation takes place, years of maintenance start the cycle over again.

FULL VALUE MAINTENANCE

We pioneered the process of Full Value Maintenance. Our proprietary service aggressively maintains 100% market value by performing annual market revaluations. This ensures every property owner is paying only their fair share of taxes on an annual basis and prevents large value adjustments while producing the most fair and equitable value.

ACCURATE

REFERENCES

DE PERE

Accurate Appraisal has served as the statutory assessor for the City of De Pere since 2005. In 2018, the City decided to adopt their annual Full Value Maintenance program. This transition has been beneficial to the City, because market trends over the past few years would have otherwise forced another city-wide revaluation. It also makes budget planning easier by supplying consistent information year-to-year. Our account manager at Accurate is extremely knowledgeable, and has always been responsive to our questions and needs. Accurate's proactive public relations campaign, which provides social media posts and additional website content, has been very helpful in communicating with and educating our citizens.

Carey Danen
CLERK/TREASURER
www.deperewi.gov
cdanen@mail.de-pere.org
(920) 339-4072 ext 1355

GREENVILLE

We have worked with Accurate over the last three years, who performed a total revaluation of our municipality. Their leadership in the industry is one of the reasons why we chose Accurate as our Assessor. Their friendly, reliable service is why we continue to utilize Accurate. Timely, professional response has been appreciated and we trust them to serve our residents with dependable service and fair assessments.

Wendy Helgeson
CLERK
www.villageofgreenville.com
whelgeson@greenvillewi.gov
(920) 757-5151 ext 1100

FOX CROSSING
BRIDGING THE FOX CITIES

Accurate Appraisal has professionally served as the Assessor for the Village of Fox Crossing since 2015. Over the past several years, Accurate Appraisal expertly conducted a full revaluation of the Village in 2017, and has maintained the Village at full value since 2019.A full value contract with Accurate Appraisal has provided a tremendous benefit to Fox Crossing. With the large increase in property values over the past few years, having the Village's assessed value grow incrementally over the past several years rather than a large increase in value in one year, is much easier to explain to Village residents. Accurate Appraisal has been a great partner with Fox Crossing in managing the difficult task of assessing.

Jeffrey S. Sturgell
Village Manager
www.fccommunity.com
JSturgell@foxcrossingwi.gov
(920) 720-7101

CITY OF NEW RICHMOND
THE CITY BEAUTIFUL

It is with enthusiasm that I recommend Accurate Appraisal, LLC. We could not have asked for a better partner to go through a full revaluation with this year. Their depth of experience allows them to handle even the most complicated of situations and their professionalism is obvious to our team, but more importantly to our residents. A revaluation is a big deal to a community, but doesn't have to be strain on City Staff - Accurate will get you through every step.

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THE CITY of Altoona

Cindy Bauer
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ACCURATE